# IPad, Computer, zipForm® & Docusign

### **OBJECTIVE:**

The goal of this class is to learn: Learn about the cloud to sync multiple programs and devices together

What is the difference between a computer and mobile device?

### **Creating A Paperless Office**

- I. Create a systematic filing system in the Cloud
- II. Put documents in a logical order

## <u>zipForm®</u>

- I. Create Templates
- II. Apply templates to clients
- III.Sync to the cloud

### **Docusign**

- I. Sync the computer version to the ipad version
- II. Tab non-zipForm® documents

## **Getting Clients Wet Sigs**

- I. On the computer
- II. On the ipad

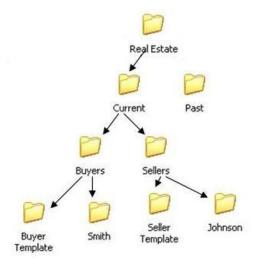






### Get a Dropbox account and create a systematic filing system

Develop and use a systematic filing system on your computer for all of your documents. This is easy to do without any cost involved. This will allow you to instantly store, retrieve and send documents to anyone involved in the escrow, even after the transaction has closed. Forget about searching for files in boxes in the garage again, or worrying about keeping your documents for five years to satisfy ADRE requirements, as you will have your documents FOREVER in your computer that you can access guickly.



www.Technology4RE.com

### Sync the zipForm<sup>®</sup> versions together

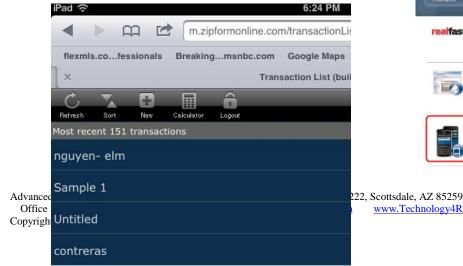
To get zipForm<sup>®</sup> on the ipad, you must purchase it from www.zipform.com for \$12.95/year. (now an AAR member benefit as of 2014)

Second, on your ipad (or other non-computer device), go to www.zipform.com and click on the Pro version.

You can now sign in zipForm<sup>®</sup> mobile. Once you sign in, you never have to enter your username and password again.

### Working with current transactions

1. A list of your transactions will appear.





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2. Then click on Edit

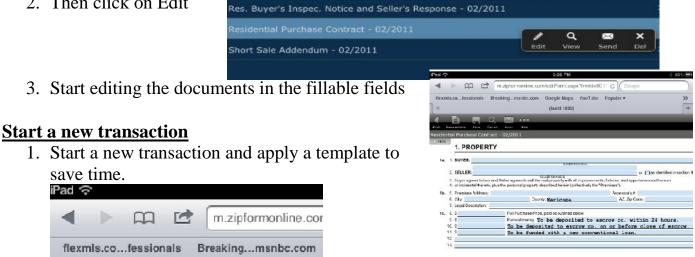
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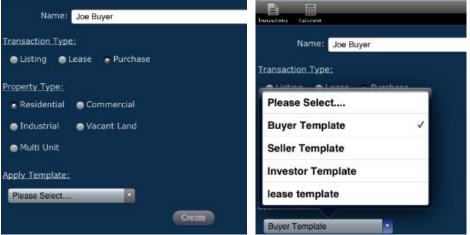
Refresh

Sort



2. Put in the buyer name, choose the type of transaction, and then choose the appropriate template.

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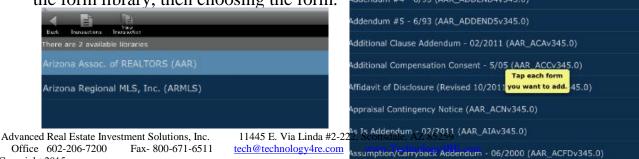


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Logout

Π Calculator

3. Add other zipForm® forms that are not in your template by choosing from the form library, then choosing the form. Addendum #4 - 6/93 (AAR ADDEND4v345.0)



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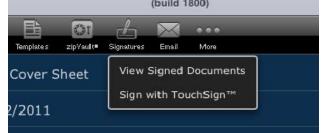
tech@technology4re.com

#### Signing through zipForm® mobile

This is a great feature to sign both with "wet" sign and electronic signatures.

Back

- 1. Choose the Signatures tool.
- 2. Choose Sign With TouchSign TM



TouchSign™ Se

TouchSig

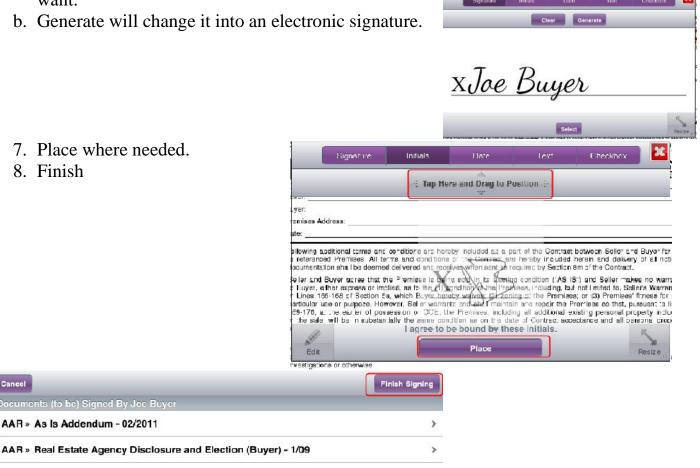
Documents Signers

- 3. Choose the documents you want.
- 4 Put in client's name and email

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Back		Forms in Transaction (tap to select) AARArizona Association Cover Sheet	Sign?
Add Signer	Documents → Signers → TouchSig	AAR » As is Addendum - 02/2011	YES 🥪
		AAR » Buyer Advisory - 11/2011	NO
First Name	Joe	AAR » Buyer-Broker Exclusive Employment Agreement-02/10	NO
Middle Name		AAR » Counter Offer #1 - 02/2011	NO
Last Name	Buyer	AAR » HOA Condo/Planned Community Addendum - 02/2007	NO
Email Address	Tech@technology4re.com	AAR » Real Estate Agency Disclosure and Election (Buyer) - 1/09	YES 🥪
Company		AAR » Res. Buyer's Inspec. Notice and Seller's Response - 02/2011	NO
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		By clicking "I Agree" you consent to the use of electronic information relating to this transaction that is required by	v law to be provided to
6. SIGN	!!!	you in writing, and to be bound by the terms and condition software (the "Service"). Click <u>here</u> to see the terms and	d conditions.
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<sup>20.</sup> Nomentikarinang the toregoing in an on-sue wakewater inseminon radiumy (conventional segue or alternative system) ("Facility") has been installated on the Fremisea, Seller and Buyer signers to corrplate and execute the AAR On-Site Wastewater Treatment Facility Addendum and Seller agrees to pay for the Facility inspections, fees er receives as set forth therei).

- a. Resize will change the size when placing the signature or initial where you want.
- b. Generate will change it into an electronic signature.



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AAR » Residential Purchase Contract - 02/2011

AAR » As Is Addendum - 02/2011

#### Docusign

Cancel

8. Finish

Through NAR, this will cost around \$216-250 per year. From your <u>computer</u> in zipForm®, go to Esign.



### From your ipad, go into zipForm®, then

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Buyer-Broker Exclusive Employment A	greement-02/10		
Counter Offer #1 - 5/96			
HOA Condo/Planned Community Addn	dm - 2/07		
Market Conditions Advisory - 8/09			
Pre-Qualification Form - 02/2013			
Real Estate Agency Disclosure and Ele	ction (Buyer) - 1/09		
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Choose the documents you want, then choose Next

#### Put the email addresses in, then choose Next

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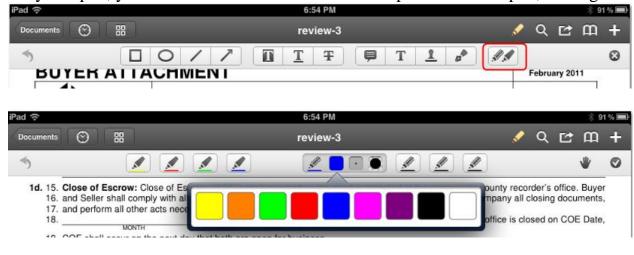
Docusign (DS) will recognize your zipForm® (ZF) documents since you went directly from ZF into DS. Therefore it will tab them for you with all places that your client has to intial, sign and date. You can also Choose an Online Document and bring in non-zipForm® docs. You will have to manually drag and drop where you want your client to initial, sign or date.

### **Getting Real "Wet" Signatures**

On your PC computer, you will need to go to:

File, Print, Journal Note Writer, Save AS or use a professional version of PDF Writer

On your ipad, you will need to transfer into PDF Expert. Go to the pen, and sign!



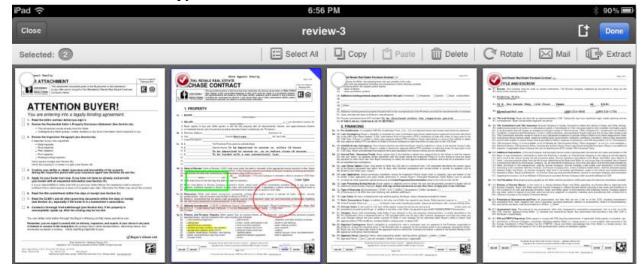
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